



Disclaimer

The information presented and discussed in this model club meeting is for demonstration and educational purposes only. The securities of companies referenced or featured in the meeting materials, presentation and discussion are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by *BetterInvesting*[™] / National Association of Investors[™]. The views, opinions expressed and decisions made by club partners regarding the purchase and sale of stocks or other assets are those of the partner(s), and do not necessarily reflect the views and opinions of BetterInvesting. No recommendation to purchase or sell any stock, mutual fund, or other security referenced is being made on behalf of *BetterInvesting*.

Securities discussed may be held by the club partners and presenters in their own personal portfolios or in those of their clients. *BetterInvesting* presenters and volunteers are held to a strict code of conduct that precludes benefiting financially from educational presentations or public activities via any *BetterInvesting* programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of *BetterInvesting* or the Director of Chapter Relations.

This meeting may contain images of websites and products or services not endorsed by *BetterInvesting*. The presenter is not endorsing or promoting the use of these websites, products or services.

Agenda for Lone Star Online Model Investment Club

March 12, 2024

- 7:00-7:05 **Welcome** – Tag Coolidge, President
- Introduction to BetterInvesting/Model Club Disclaimer
 - Introduction of Guests
 - Quorum / Call to Order
- 7:05-7:10 **Approval of February 13th minutes** – Linda Sutphin, Secretary
- 7:10-7:15 **Treasurer’s report** – Susan Clewell, Treasurer
- 7:15-7:30 **Education** – Sharad Patel
- 7:30-7:55 **5-minute stock reviews**
March Reviews FLT Jerry INMD Susan AMZN Sharad alnt Tag.
Special Review – Concentrix (CNXC)
- 7:55-8:10 **Portfolio Lone Star Spreadsheet Review**
Please provide a short update of up to 1 minute unless there are MAJOR changes that club members must be aware of. If you would like to recommend a BUY or SELL of the stock you follow, please be prepared with a current SSG in the event members might want to look at it.
- April Reviews NSP Lynda W. RMD Tag UNH Woz PERI Jerry W/Dhanajay
May Reviews LULU Linda S. ADUS Tag CNXC Sharad MSFT Woz
- 8:10-8:30 **Presentation of stocks to add to our watch list**
Kinsale (KNSL) – Dave Wozniak
- 8:30-8:50 **Buy/Sell/Stock Suggestions/Motions/Discussion/Voting**
- 8:50-8:55 **Make/change Stock Watcher assignments**
- 8:55-8:59 **Final Comments**
- 9:00 **Adjournment**

5-minute stock review assignments for April 9, 2024 meeting:

April Reviews NSP Lynda W. RMD Tag UNH Woz PERI Jerry W/Dhanajay

Upcoming Events

The 2024 BetterInvesting National Convention (BINC) will be on May 16, 2024 – May 19, 2024, at the Chicago O'Hara Marriott Hotel. Registration is now open.

The North Texas March Investor Education Workshop is scheduled for March 16 at 10:00 AM. It is a free online only workshop and is titled Using Audit and Ratio Features in SSG Judgments You can register online here <https://www.betterinvesting.org/chapters/north-texas/local-events/inv-ed-wkshop-audit-ratio-features-mar> or at the North Texas Chapter Local Events page.

The next 4-BITS for Volunteers training is coming March 20, 2024 and will have as topics the following: PowerPoint continued, Portfolio tune-up continued, Chapter Chat Replacement, Introduction to Mentoring. **Look in the Chapter Advance for more information.**

Click on the following link to be able to access a free trial subscription to BetterInvesting: [BetterInvesting 90 Day Trial](#)